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Stephen Dew

University of North Carolina at Greensboro, shdew@uncg.edu

Michael Crumpton

University of North Carolina at Greensboro, macrumpt@uncg.edu

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TAKING A STEP BACK, TO MOVE FORWARD

Stephen Dew (shdew@uncg.edu) *Collections and Scholarly Resources Coordinator, University of North Carolina at Greensboro*

Michael Crumpton (macrumpt@uncg.edu) *Assistant Dean for Administrative Services, University of North Carolina at Greensboro*

During the last three years, the University of North Carolina at Greensboro has undertaken three separate de-duplication projects that involved the de-selection of resources based on their availability through certain methods of electronic access. Two projects involved the cancellation of journal subscriptions, and the other involved the weeding of bound journals.

In 2007, confronting the problems caused by the ever-increasing cost of serials, UNCG Libraries pursued a major de-duplication project with the aim of cancelling print subscriptions for journals in favor of electronic-only subscriptions, when the publisher offered the option. With the inflation rate for individual journal subscriptions greatly exceeding the overall national inflation, the University Libraries had used a combination of new money (primarily a portion of the university's enrollment-increase money) and reallocation of money away from monographic purchases in order to avoid large-scale journal cancellations. Both of those strategies, however, were beginning to wear thin. Because of an expected static budget, the Libraries were reluctant to make additional cuts to the number of books purchased. After reviewing several options, the Libraries' Collection Management Committee decided that the best solution for reducing costs and maintaining the coverage of the journal collection was to eliminate duplication of format (where current journal subscriptions include both print and electronic formats). In 2007, the Libraries maintained fewer than 3,000 subscriptions for journals in print format, and for over 800 of those titles, the Libraries subscribed to both print and electronic.

Liaisons sent a letter and spreadsheet to the chair and faculty representative for each of their departments, explaining the purpose of the weeding project and the reasons for the recommendations for eliminating the print copies of duplicate subscriptions. The letters did offer faculty the option of keeping the print version if it were truly essential for research or instruction. One department kept the print copies of significant number of journals assigned to it; otherwise, only a few duplicate print-&-electronic subscriptions were maintained.

As a result, the print subscriptions for 813 journals were cancelled, with e-only subscriptions being maintained. There were immediate savings on subscription costs, and there were additional savings on the reduction in processing, claiming, and binding costs. Additional benefits included shelf space being freed in Current Periodicals area and in Stacks. Importantly, in this project, the Libraries did not lose content; it removed duplication; and it still provided what users want most—electronic access to the information.

In 2009, due to serious budget cuts that were ordered by the state government, UNCG Libraries undertook another major de-duplication project that involved cancelling subscriptions for journals (both print and electronic) when the journals were available in certain aggregator databases. The Collection Management Committee developed a list of protected aggregator databases (databases that would not be cancelled, except in the worst of circumstances). The journal coverage of those databases was investigated, and a spreadsheet was developed that included 1,750 journals for which UNCG had direct subscriptions (not covered by a package deal). If the aggregator database provided access to the PDFs for the current year, the journals were considered for cancellation. The liaisons checked each title to verify that current issues of

the journal were indeed accessible through at least one of the aggregator databases, and a spreadsheet of recommended cancellations was prepared. Liaisons then sent the spreadsheet with an explanatory cover letter to each department chair and faculty representative. Faculty were generally supportive, and through the project, over 700 journal subscriptions were cancelled, cutting \$175,000 from a total serials budget of \$1.52 million. Importantly, the Libraries lost no content, removed duplication, and still provided what users want most—electronic access to the information. In this case, however, the Libraries did lose ownership.

In 2008, the Libraries began a major space repurposing project for Jackson Library (the main library) that involved the need to remove a massive amount of shelving and printed material from the building. A large portion of the space occupied by the collection was to be renovated for public services and other purposes. This de-duplication project involved the weeding of the print volumes of a journal when the Libraries owned permanent electronic access and the transfer of the print volumes to storage when the Libraries subscribed to electronic access, but did not permanently own the access.

In the spring of 2008, after receiving feedback from library staff and a student assessment survey, UNCG Libraries hired Lambert Architects to conduct a space assessment study regarding the re-purposing of existing space in Jackson Library. This study led to a set of recommendations expressed in one-year increments over the course of five years, so as to allow the proper timing of funding allocations. To begin planning for the first phase of the project and to coordinate the Space & Re-purposing Project, the Dean appointed the Space Planning Committee, which began meeting in July 2008. Within two months the committee finished the first draft of its planning and procedural document—“Jackson Library Weeding and Space Re-purposing Project: Guidelines & Procedures.” This document and other related documents were placed on Blackboard for easy access by members of the committee and others working on the project.

The primary criterion for weeding journal volumes was that the Libraries own permanent online access to the volumes. A list entitled “Vendors with Permanent UNCG Access to Journal Backfiles” was created and posted on Blackboard, and a spreadsheet was developed that listed all relevant titles, providing each journal’s title, call number, holdings information, vendor, and backfile information. In addition, three blank columns were added to the spreadsheet for liaisons to make their recommendations—“Weed,” “Transfer to Ferguson,” and “Keep in Jackson.” For each title, liaisons verified that there was indeed online access to the backfiles, and they examined the quality of the PDF copy to ensure that it was equivalent to the print. On the spreadsheet, liaisons made recommendations for weeding, transferring, or keeping specific volumes and years.

Afterwards, liaisons sent a letter and spreadsheet to the chair and faculty representative for each of their departments, explaining the purpose of the weeding project and the reasons for the recommendations for weeding, transferring, or keeping specific titles in the departmental discipline. The letter noted that the space re-purposing project was addressing a major problem—the Library was running out of space on its shelves, with hardly any room for expansion of the book collection or renovation for user space. The letter noted that the vast majority of users prefer the easy accessibility of the online version and that, by withdrawing the print copies of journals for which the Libraries owned permanent online access, faculty and students did not lose access to content—the Library was eliminating duplication and removing the print copy from crowded shelves in favor of the electronic copy.

In addition, the spreadsheets for the various disciplines were placed in the Space Planning Committee's folder in Blackboard for a two-week review period, so that all liaisons could review all recommendations, especially looking for interdisciplinary titles. In a few cases, there were conflicting recommendations, and a dialogue with an eventual compromise would ensue.

The Weeding and Space Repurposing Project was done in stages and took over two years to complete. The review process started in the spring of 2008, covering all of the titles in the basement, and then the process moved to the tower, where each of the eight floors was reviewed separately. At first, the schedule was optimistic; with liaisons allowed one month to review all of the titles on the floor, but since liaisons are generally very busy people, especially at certain times of year, so the schedule was adjusted as needed. The process ended up being a long and thoughtful one.

Our weeding project was well underway when, on September 29, 2009, the Ithaka Report was issued (<http://www.ithaka.org/ithaka-s-r/research/what-to-withdraw>). Entitled "What to Withdraw: Print Collections Management in the Wake of Digitization," the report analyzed the types of journals that can be withdrawn responsibly, allowing libraries the maximum possible flexibility and savings. Shortly afterwards, the Association of Southeastern Research Libraries (ASERL, UNCG is a member) announced its support for the Ithaka Report. Although the report emphasized that print copies of journals must be preserved, especially by ARL and other research libraries, it nevertheless noted that, in the face of high quality and well-preserved digitization, academic libraries like UNCG can responsibly withdraw the printed volumes of journals when the library owns permanent online access.

The Weeding and Space Repurposing Project has made a significant difference in the Libraries' ability to sustain growth, maintain quality, maintain access, and allow for renovation. Over 7,000 linear feet of bound journals have been weeded from Jackson Library; 1,500 linear feet of bound journals have been weeded from Storage; and 1,000 linear feet of bound journals have been moved from Jackson to Storage. In addition, 700 linear feet of books were weeded from Jackson Library; 2,500 linear feet of books were weeded from Storage (review still in progress); 50 linear feet of microforms were weeded from Jackson; and 25 microform cabinets were moved from Jackson to Storage.

At UNCG, we cannot afford to become a museum for printed journals that are available electronically. We cannot afford to become a museum for old books that are duplicates, out-of-date, or out-of-scope. Our current patrons do not use them, and we can expect the same behavior from our future patrons.

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